



SALES AND FINANCE

Project profitability review

A retrospective worksheet for comparing planned and actual effort, cost, margin, and scope decisions after delivery.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A project has finished and you want to learn from the commercial outcome.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Compare plan to actual**

- ☐ 02 **Review unplanned work**

- ☐ 03 **Check external costs**

- ☐ 04 **Identify margin drivers**

- ☐ 05 **Capture estimate improvements**

- ☐ 06 **Share lessons with the team**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.